

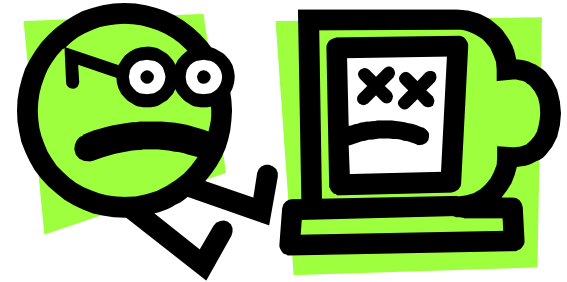
Implementation of Design Scheduling

Dean Mees

Maria A Deeb-Roberge



Program & Project Mgt. Section



- We are here to support the five year program and all active projects you have been assigned.
 - ✓ **What can we do better?**
 - ✓ **What information do you need?**

Agenda

- Design Process
- Information Development Process
- Project Kick-Off Meeting
- Project Schedule
- Break
- Schedule Update Request Form (SURF)
- Project Management Reporting (PM)
- Active Project Status Report (APSR)



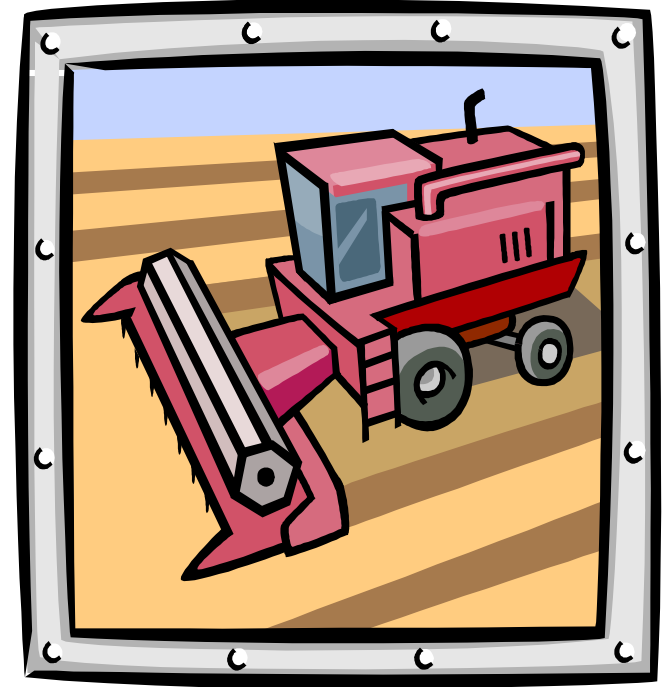
ADOT Scheduling rules for Design Projects



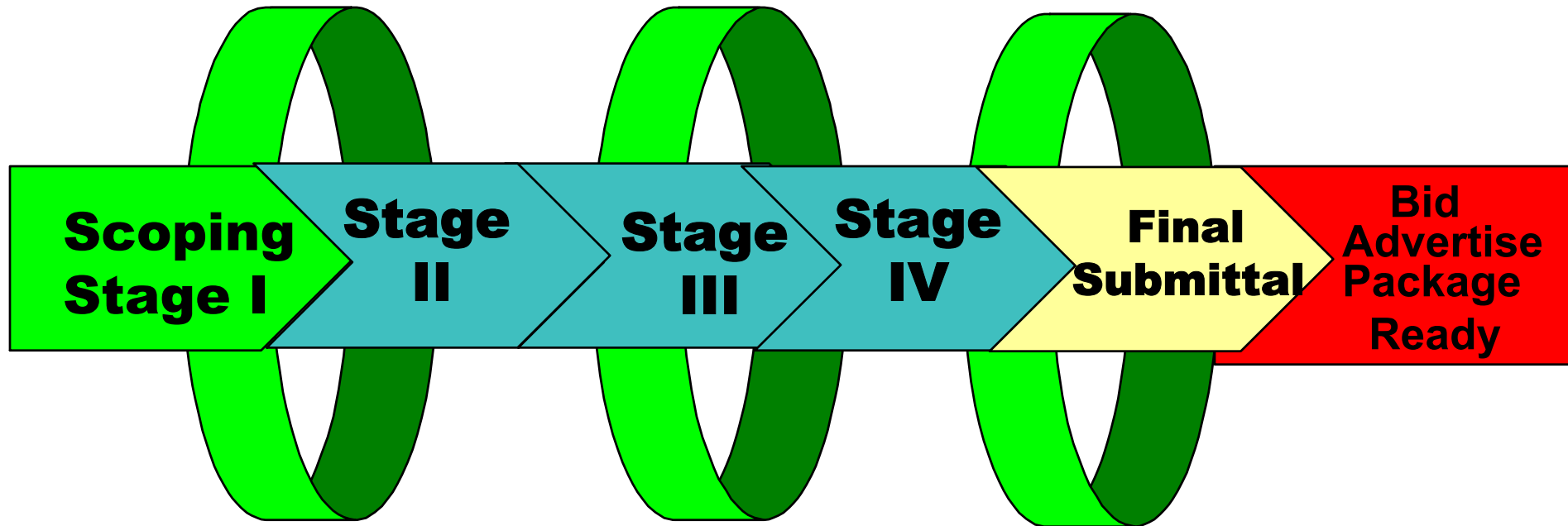
- Project: Unique Entity
 - Each project team is rarely made up of the same members
 - Each project has unique quality requirements: goals, specifications & contract language
 - Each project happens in a unique environment: unique site, unique stakeholders, unique timeframe
 - Each of the projects have unique expected results: quality and customer satisfaction

..... but they also have some similarities

- The life cycle of an ADOT Design Project is the progression along the design stages:



Project Design Process



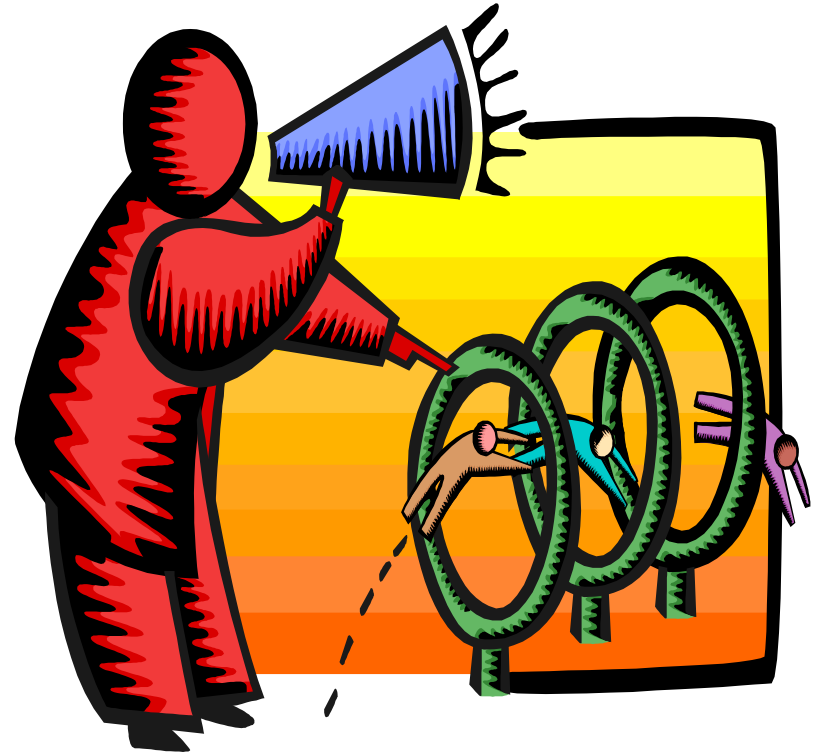
Design Process

- **Linear component:**
Stages defined for measuring project performance and progress
- **Circular component:**
All people involved in a project, as well as the required deliverables that define the need for them to be part of the project TEAM



What is to be delivered by the TEAM?

- This table is to be used **WISELY** as a guide.
- Remember to custom tailor it to your **UNIQUE** project
- This guide will help us not feel as if we are “jumping through hoops”



Requirements: GUIDE FYI

DOCUMENTS REQUIRED FOR DESIGN PHASE SUBMITTALS

CONTRACT DOCUMENT ITEM	STAGE I REVIEW	STAGE II REVIEW	STAGE III REVIEW	STAGE IV REVIEW	FINAL PS&E
Face Sheet		P	F	F	F
List of Standard Drawings			P	F	S
Design Sheet & Index			P	F	S
Summary Sheets			P	F	S
Special Detail Drawings			P	F	S
Typical Roadway Sections	I	P	F	F	S
Roadway Plan & Profile Shs	P	F	F	F	S
Parking Area Plans & Dtls		P	F	F	S
Drainage Plans & Details		P	F	F	S
Intersection Plans & Dtl		I	P	F	S
Interchange Plans & Dtls		P	F	F	S
Major Struct Plans, Dtls		I	P	F	S
Traffic Signal Plns, Dtls		I	P	F	S
Traffic Control Plns, Dtls		I	P	F	S
Sequence of Construction		I	P	F	S
Traffic Control Duration & Quantities		I	P	F	S
Signing & Pavement Mrkg Plans & Quantities			P	F	S
Lighting Plans & Details			P	F	S
Landscape Plans & Details			P	F	S
Utility Reloc Plans, Dtls			P	F	S
Stormwater Pollution Pre- vention Control Plan			P	F	S
Special Drawings & Details			P	F	S
Roadway Cross Sections		P	F	F	F
Summary of Final Earthwork Quantities		P	F	F	F



Items must achieve the desired goal

Must be specific to the project's scope



NOW it makes
sense!!!!!!

CONSTRUCTION DOCUMENT ITEM CONTINUED	STAGE I REVIEW	STAGE II REVIEW	STAGE III REVIEW	STAGE IV REVIEW	FINAL PS&E
Quantities & Combined Cost Estimate		P	P	F	F
Special Provisions			P	F	S
Construction Schedule			P	F	S
DBE Participation Goals				P	F
Bidding Schedule			P	F	F
Final Design Calculations				F	S
Bound Survey Books	F	S			
Right-of-Way Requirements		P	F		
Drainage Report -Roadway		P	F	S	
Drainage Report -Structure		S			
Traffic Analysis Report		S			
Bridge Foundation Report		S			
Structure Selection Report		S			
Pavement Design Summary		S			
Geotechnical Report		S			
Environmental Permits		P	F		
Environmental Mitigation Measures	I	P	F		
Materials Design Memo		P	S		
Arizona State Plane Coordinates		S	F	F	S

LEGEND: I denotes initial concepts
P denotes preliminary, unchecked, excluding minor details
F denotes final, checked, all details and quantities
S denotes sealed in accordance with technical registration requirements

NOTE: The review stages roughly correspond to the following completion levels of the Design Phase: Stage I: 15%; Stage II: 30%; Stage III: 60%;, Stage IV: 95%; Final PS&E: 100%.



SCHEDULES MUST

2AXPL	Pre-Design/Scoping Complete
40XPL	Design Start - Notice to Proceed
40XPL1	Project Start-up/Kick-off
41XES	Mapping/Survey Complete
41XPL	<u>Design Stage I Submittal</u>
42XGS	Geo. Test and Report Complete
43XVA	Value Analysis Recommendation Report Complete
46XEP	Environmental Clearance Obtained
42XPL	<u>Design Stage II Submittal</u>
46XRW	Right-of-Way Clearance Obtained
43XTD	Traffic Control Plans Complete
43XPS	Final Materials Report Complete
43XPL	<u>Design Stage III Submittal</u>
46XUR	Utility & Railroad Clearance Obtained
44XPL	<u>Design Stage IV Submittal</u>
45XPL	Submittal of Final PS&E to C&S
CS960	Finalize PS&E
CS998	Bid Advertisement Package - Ready
CS999	Bid Advertisement Date
6XPL	Bid Award Date
7XPL	Est. Construction Duration _ Facilities Open to Traffic

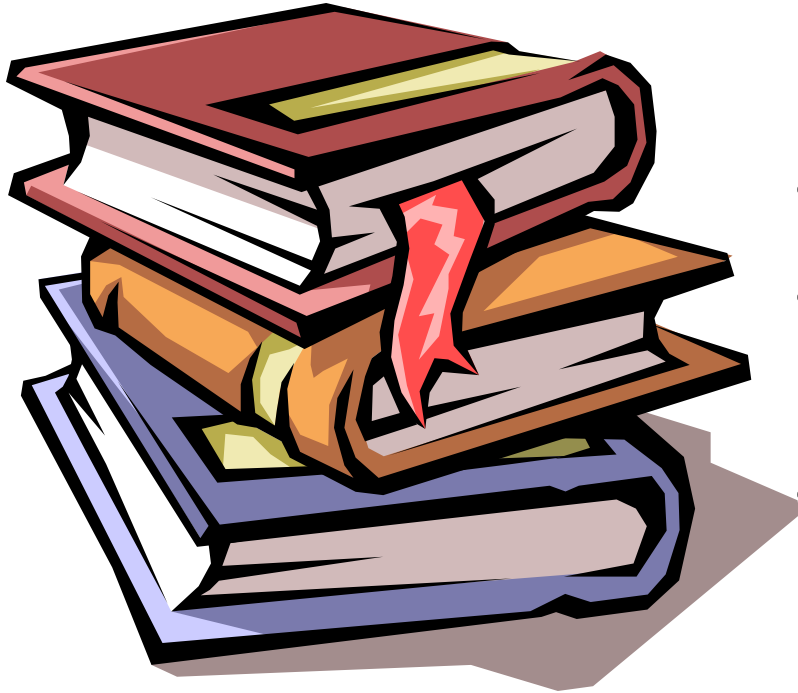
- 21 Project Milestones are KEY EVENTS for measuring the Design Progress.
- DO not change ID's or Descriptions
- Custom fit it to what you are doing

How to build a schedule !!!

- If you are a technical leader or an on-call consultant:
 - Establish what is your first project deliverable. This will define the design stage were it **MUST** be completed
 - **EXAMPLE:** Environmental Group
 - At **Stage I** you are required to have “Environmental Mitigation Measures” defined- initial concepts (Required design deliverable checklist)



Break the project deliverable into tasks to be performed



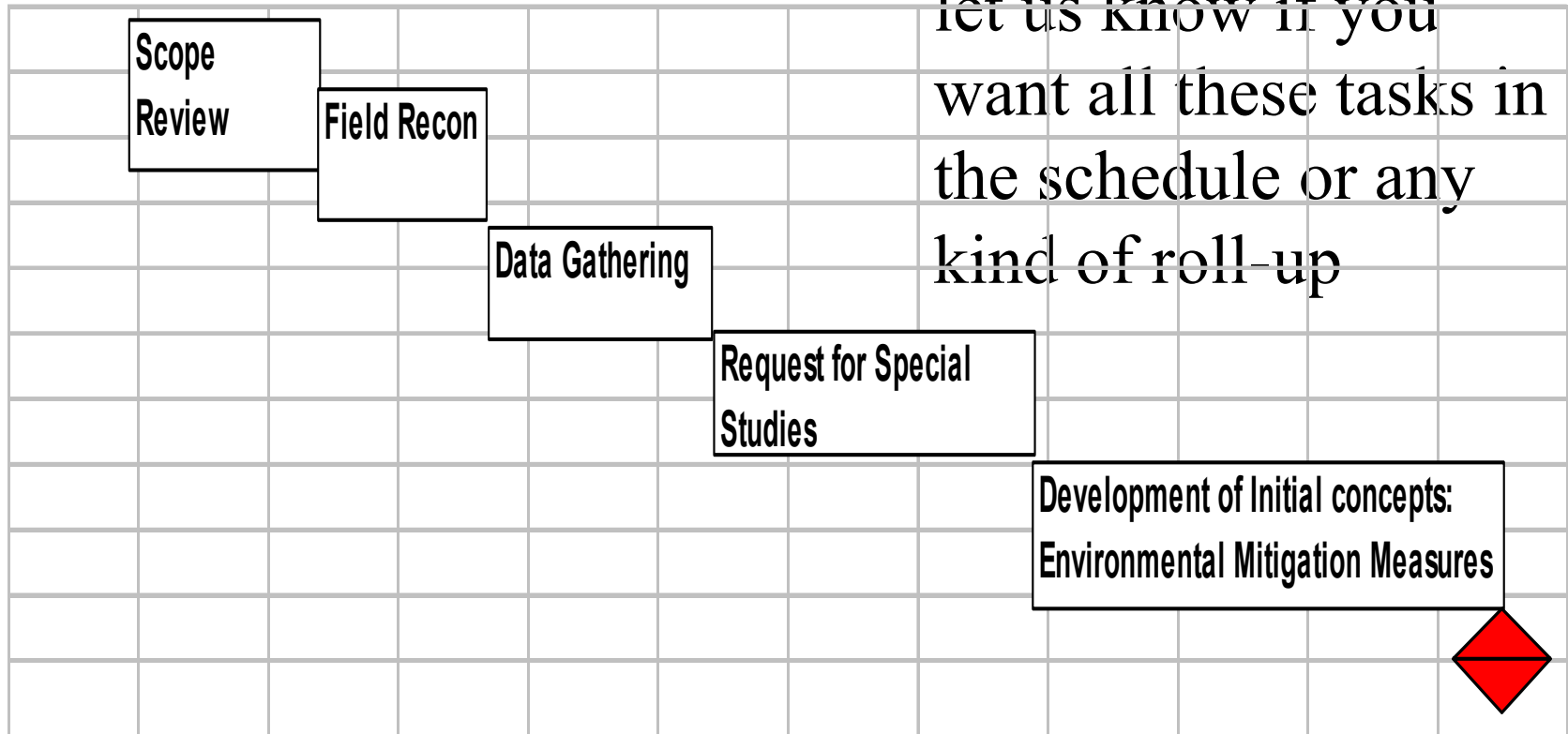
- For the Initial Mitigation Measures you need:
- 1. Scope review
- 2. Environmental Field Recon. & Data gathering
- 3. Request need for Special Studies (Cultural, Archeological, Water, Noise.....)

So now we have:

- Environmental Scope review
- Environmental Field Recon. & Data gathering
- Request need for Special Studies
- All these task when completed result in
 - Development of initial concepts: Environmental Mitigation Measures

What we have now is:

- Draft schedule. Please let us know if you want all these tasks in the schedule or any kind of roll-up



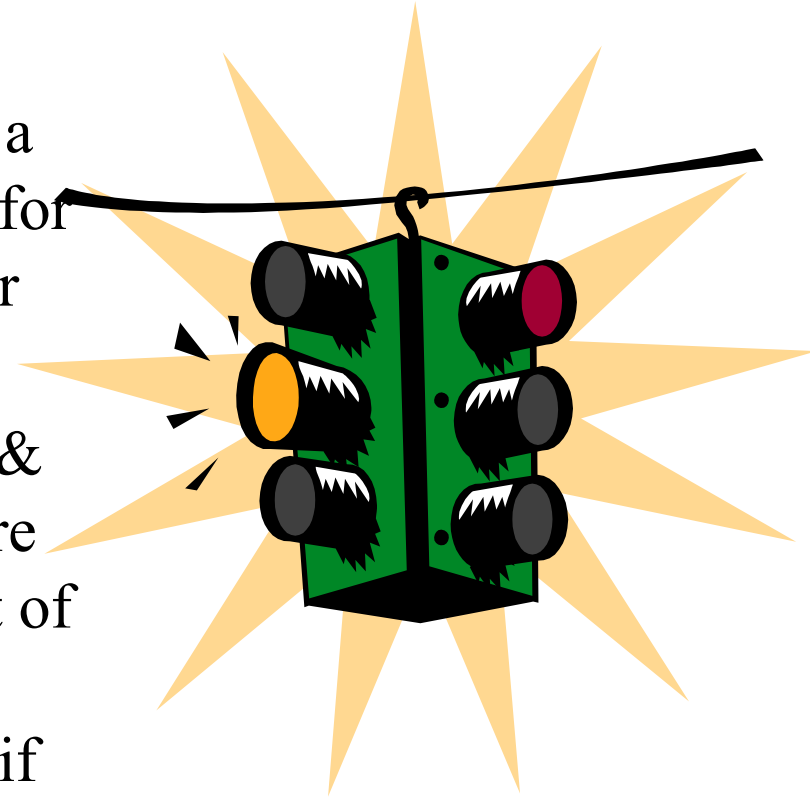
**41XPL Design
Stage I
Submittal**

What to do if I Need To Develop A Project Schedule?

- **Scope review: what is the problem that you need to solve.**
- **Determine YOUR project deliverables**
- **Determine what sections have to be involved; create YOUR project team**
- **Request all team members to breakdown their deliverables into tasks (per stage)**
- **ALL (ADOT & Consultant tasks) must be accounted for in Draft schedule**
- **Tie all deliverables with the 21 milestones**

YOU are not alone

- We, PPMS will help you develop a roadmap (schedule) if you define for us your tasks and deliverables (per stage).
- This applies for technical leaders & ADOT project manager. If you are a Consultant and the development of the schedule is in your scope of work, please come to us for help, if you need it.

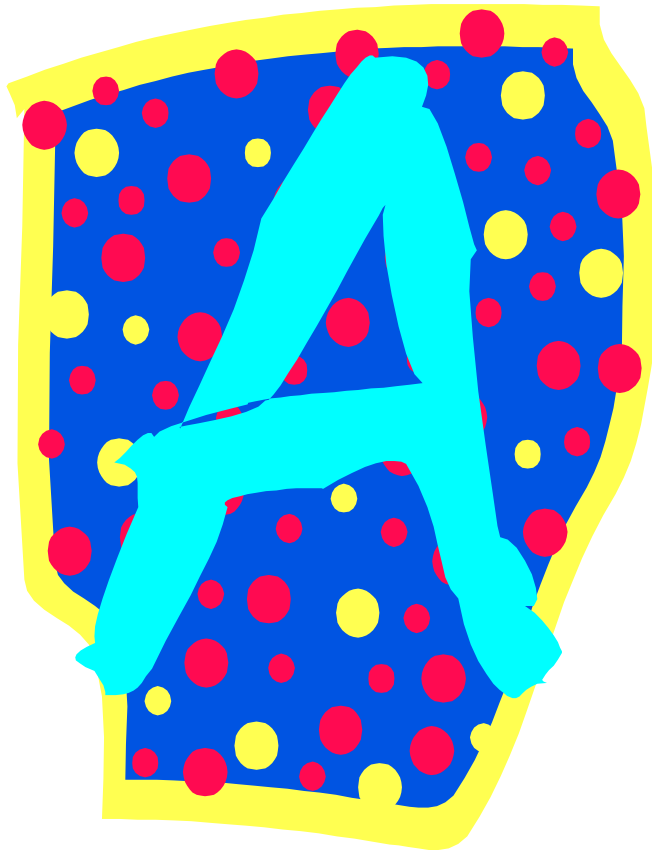


Development of Schedule



- Now we can define the deliverables or Documents required at a detail level.
- We can define this as the list of activities that are needed to achieve or complete them.
- Because many people are involved we want consistency and no room for miscommunication or problems..... please use

Schedule Logic:



Activity ID Code:

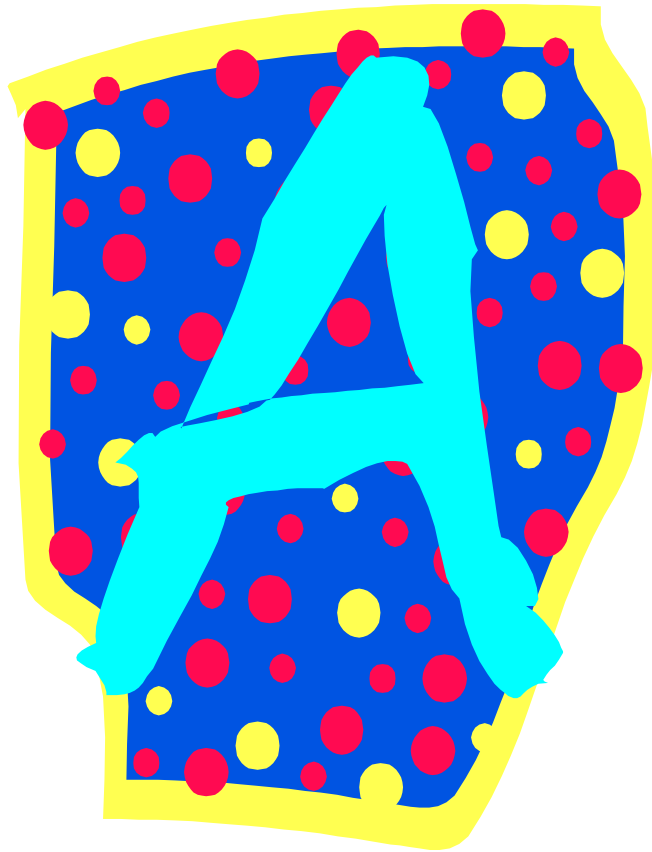
Position 1

- 2= pre-design phase,
- 4= design phase,
- 6=construction

For the Design Phase, position 2 indicates the Stage.

- 1=Stage I (<> 15%),
- 2= Stage II (<> 30%),
- 3= Stage III (<> 60%),
- 4= Stage IV (<> 95%),
- 5= 100% plans complete
- 6= Multi – stage activities

Schedule Logic:

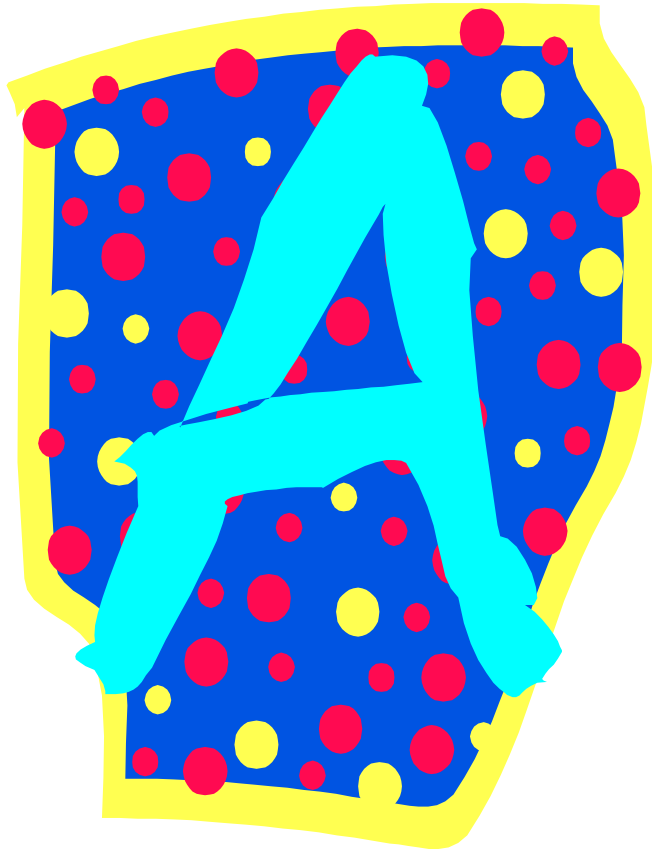


- **Position 3&4 (for pre-design and design)**

- ☐ • X = Milestone Completed
- ☐ • 00= Project Coordination
- ☐ • 01=Defining Scope of Work
- ☐ • 02=Request for survey/test/permit/clearance
- ☐ • 03=Design revise plans
- ☐ • 04=Selection of consultants
- ☐ • 07=Review/approve in house reports, plans, spec and estimates
- ☐ • 08=Review/approve consultant reports, plans, spec and estimates
- ☐ • 09=Rework to eliminate unsatisfactory performance
- ☐ • 25=Perform material testing
- ☐ • 61=Field Survey
- ☐ • 71=Mapping
- ☐ • 81=Field Survey (second one is needed because of complexity of requirements)
- ☐ • 84=Perform Value Analysis
- ☐ • 91=Consultant Contract Administration

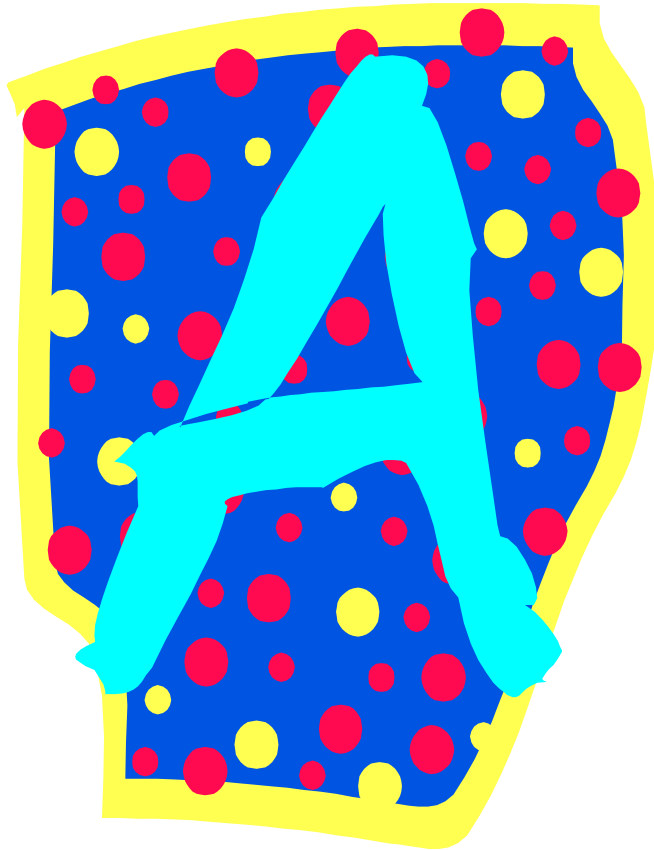
Responsibility Group:

Position 5& 6 for pre-design and design)



AE	ROADWAY PREDESIGN, ADOT IN HOUSE
AEC	RDWY PRE-DSN BY CNSLT
BD	BRIDGE DESIGN-ADOT
BDC	BRIDGE DESIGN BY CNSLT
CS	CONTRACTS & SPECIFICATIONS, ADOT IN-HOUSE
CSC	CONTRACTS & SPECS BY CNSLT
DC	DESIGN CONSULTANT
DD	DRAINAGE DESIGN-ADOT
DDC	DRAINAGE DESIGN BY CNSLT
DR	DISTRICT REVIEW
EC	ENGINEERING CONSULTANT SERVICES-ADOT
EP	ENVIRONMENTAL PLANNING, IN-HOUSE
EPC	ENVIRONMENTAL PLANNING BY CNSLT
ES	ENGINEERING SURVEYS SERVICES
ESC	ENGINEERING SURVEYS SERVICES BY CNSLT
GS	GEOTECHNICAL SERVICES / BRG FND-ADOT
GSC	GEOTECHNICAL SERVICES / BRG FND BY CNSLT
HP	ROADWAY DESIGN-ADOT
HPC	ROADWAY DESIGN BY CNSLT
PE	PROGRAM & PROJECT MANAGEMENT SECTION-ADOT
PL	PROJECT LEADER / MANAGER-ADOT
PLC	PROJECT LEADER / MANAGER-CONSULTANT
PM	PHOTOGRAMMETRY AND MAPPING-ADOT
PMC	PHOTOGRAMMETRY & MAPPING BY CONSULTANT
PS	PAVEMENT SERVICES-ADOT
PSC	PAVEMENT SERVICES BY CNSLT

Responsibility Group:



RD	ROADSIDE DEVELOPMENT-ADOT
RDC	ROADSIDE DEVELOPMENT BY CONSULTANT
RW	RIGHT-OF-WAY, IN-HOUSE
RWC	RIGHT-OF-WAY BY CNSLT
TD	TRAFFIC DESIGN, ADOT IN-HOUSE
TDC	TRAFFIC DESIGN BY CNSLT
TEC	TRAFFIC ENGINEERING BY CONSLT
TS	TESTING SERVICES-ADOT
UR	UTILITIES & RAILROAD, IN-HOUSE
URC	UTILITIES BY CNSLT
VA	VALUE ANALYSIS - ADOT
VAC	VALUE ANALYSIS - CONSULTANT

Examples:

4100PL

* Design Phase Stage I Project Coordination

4204EPC

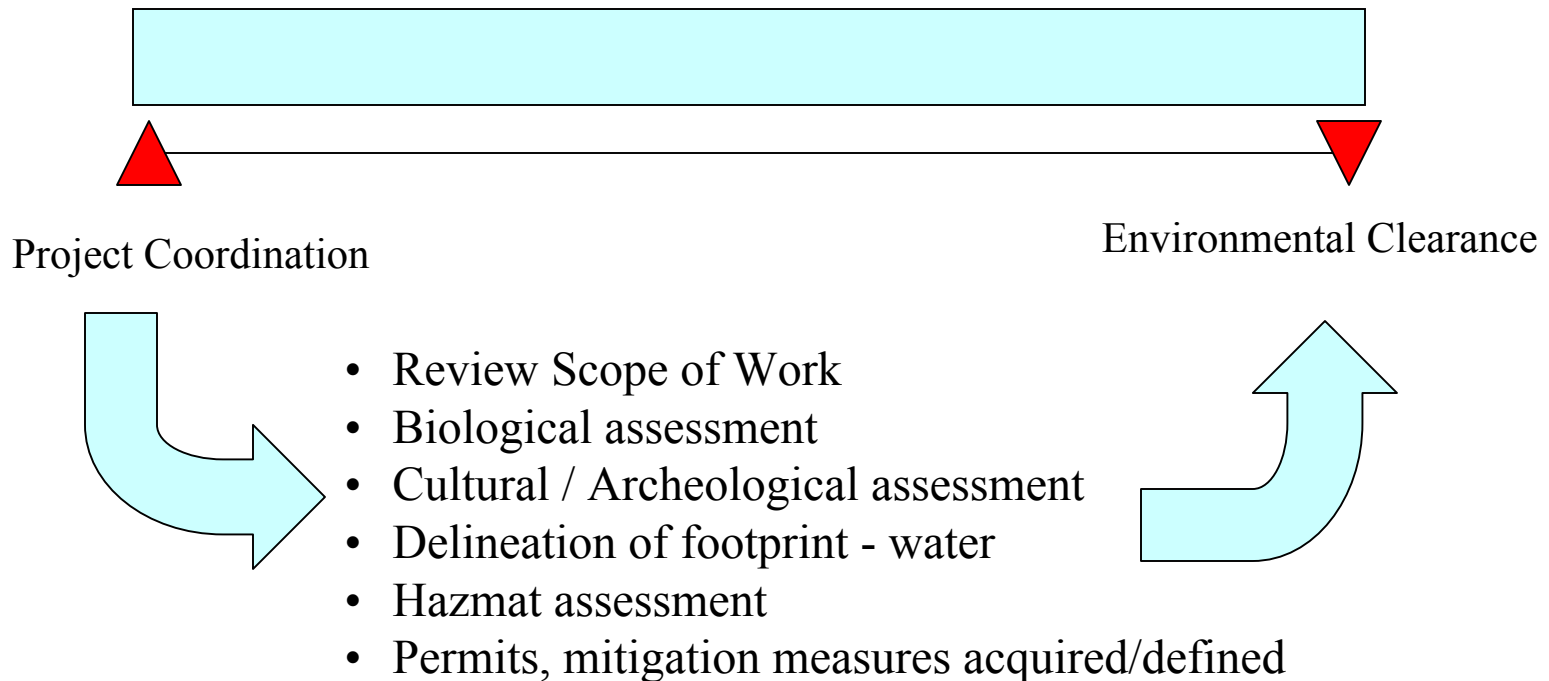
* Design Phase Stage II Selection of Consultants Environmental Planning Group

QUESTIONS???

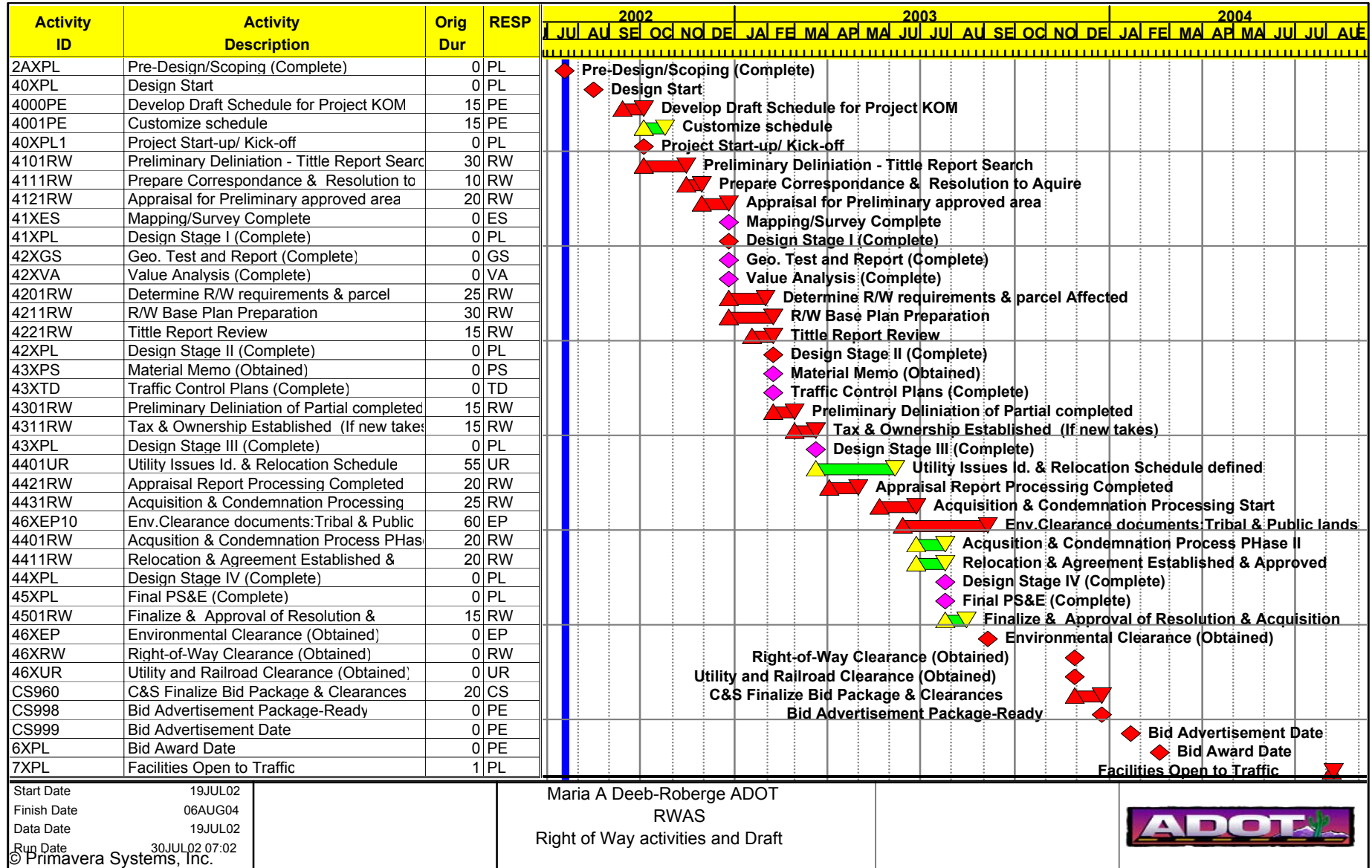


Environmental Planning Activities

Environmental Planning Time Line



Right of Way Activities within the 21 milestones



Information Development Process: RULES OF THE GAME

Draft to be presented at
the KOM

1. 10 working days AFTER the Notice to Proceed
(Or after Cost estimate is agreed on)
a draft schedule must be developed containing
21 milestones, ADOT calendar, major tasks

Agreed upon
schedule

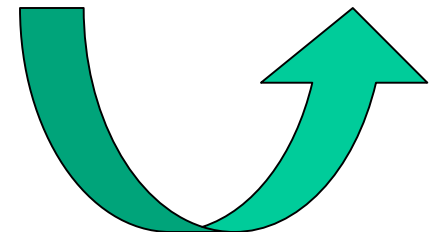
2. 10 working days after the Scope Clarification or/and kick-off meeting the
Project team members must agree on work to be done, and a schedule reflecting this is to be given to PPMS
Must contain (1.) AND detailed activities (coding, durations, logic)

3. SURF forms sent to ADOT TL's
and consultants. Forms
are returned and processed
by PPMS

4. PM reports sent out. Information
Based on the SURF

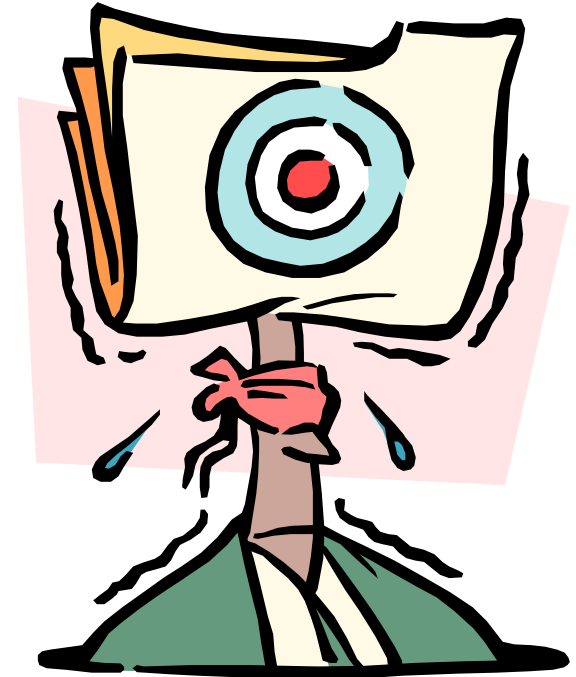
5. APSR produced, based on
customized schedules and
SURF/PM reports

Recurring
monthly
process



Value in the project schedule

- Schedule must be dynamic: reflect the progress of the project and the reality of its environment
- Schedule is only valuable if it accurately represent the project's uniqueness..... We need your updates
- Updates are requested from those who are responsible for task performance: SURF updaters; it's a monthly occurrence
- (SURF Schedule Update Request Form)



PM & SURF Calendar

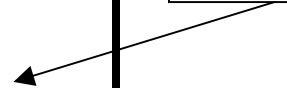
May 2003						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
				PM Reports Due 5/5/03 COB		
4	5	6	7	8	9 (BTS)	10
	PM Reports Due COB	PPMS Enter PM Reports		Draft APSR		
			Blackout Period - No P3 Schedule Updates			
11	12	13	14	15	16	17
	Final APSR				SURF Distribution	
	Blackout					
18	19	20	21	22	23 (BTS)	24
	SURF Spreadsheets / Consultant Schedules due Friday May 23 Close Of Business.				APSR Data Date	
25	26	27	28	29	30	31
		Enter SURF Updates	Enter SURF Updates	Distribute PM Reports	PM Reports Due 6/3/03 COB	

PM & TL update the schedule

PM & SURF Calendar

June 2003						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6 (BTS)	7
	PM Reports Due 6/3/03 COB		PPMS Enter PM Reports		Draft APSR	
				P3 Blackout Period		
8	9	10	11	12	13	14
		Final APSR			SURF Distribution	
	P3 Blackout Period					
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	SURF Spreadsheets / Consultant Schedules due Friday June 20 Close Of Business.				APSR Data Date	
22	23	24	25	26	27	28
	Enter SURF Updates	Enter SURF Updates	Distribute PM Reports	PM Reports Due 6/30/03 COB		
29	30					
	PM Reports DUE COB					

PM & TL update
the schedule



Data Date Definition



Data Date:

The date used to analyze schedule data and report from it the project and activity status.

Data Date is equal to the close of business on the date it references.

Remaining Duration is the projected business day(s) required to complete the activity in relation to the Data date.

DATA DATE

(DD)

Determination Of Remaining Duration

Early Finish

Start

(EF)



Fraction Of Activity Completed

**Remaining Duration (RD)
In Business Days**

$$\begin{array}{ccccccc} \text{Data Date} & + & \text{Remaining Duration} & = & \text{Early Finish} \\ \text{DD} & + & \text{RD} & = & \text{EF} \end{array}$$

Data Date Examples

**In the process of creating the original schedule,
the work to be performed can be defined by
an activity.**



Example

Activity is to start May 12th, 2003

The Activity's duration is projected to be 25 days.

Please calculate the Early Finish date. 6/16/2003

Note: Do not count holidays or weekends.

Data Date Examples

Now let's update the activity.

Data Date is set at May 23rd, 2003, and FROM the Data Date we project that we need 14 days to complete the activity's work (RD). Please calculate now the Finish date.

Let's proceed:

Actual start = 05/12/03

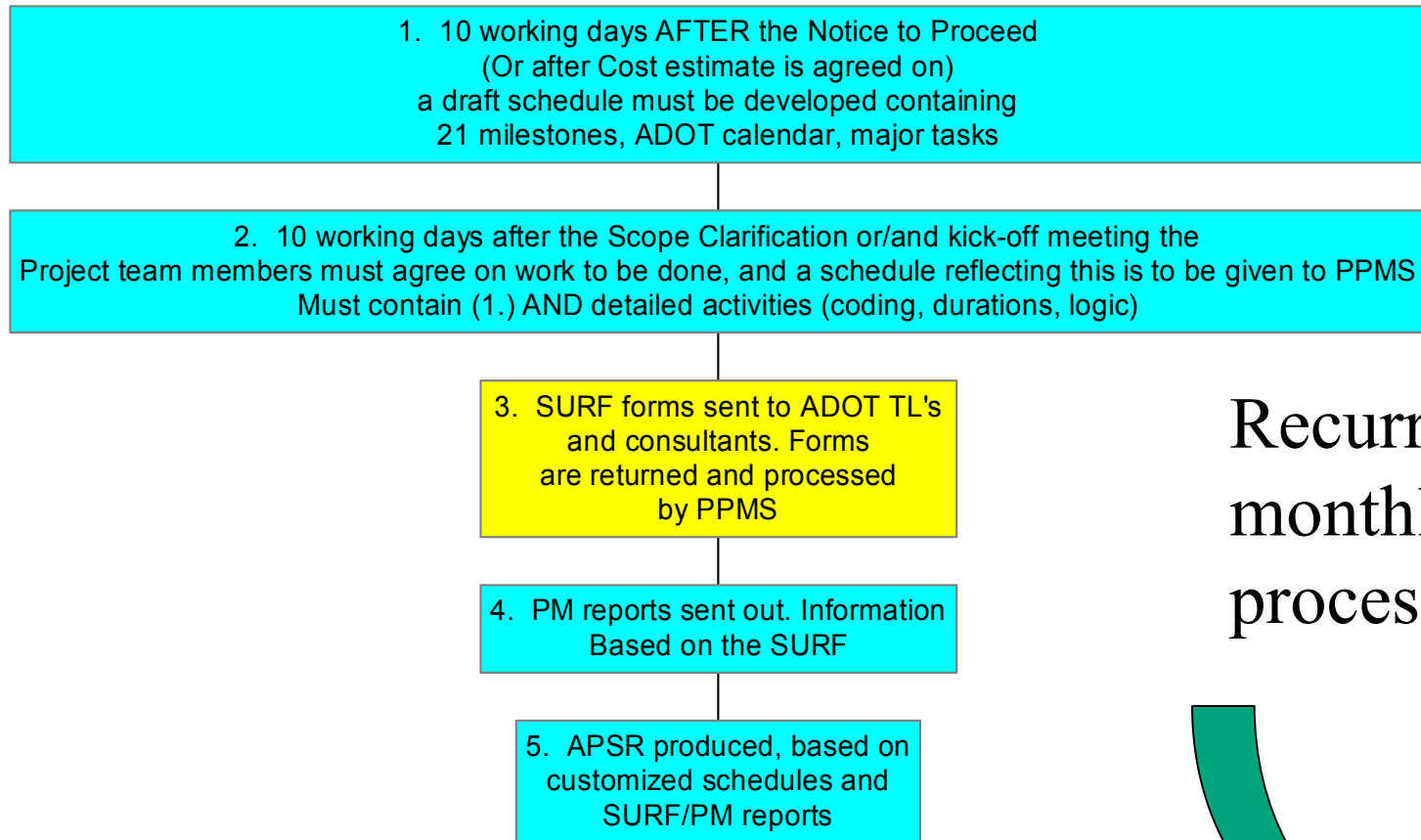
Remaining Duration (RD) = 14 days of work left.

Finish Date? 06/13/03

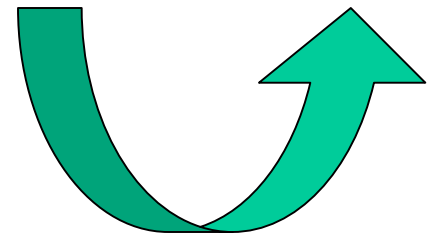
Don't count: Holidays, Weekends, or Data Date



Information Development Process:



Recurring
monthly
process



SURF Process



- Once schedule is customized, SURF forms are sent out to ADOT TL's and consultants. This form queries the technical leaders for status at the activity level.
- The person assigned to update the surf information for an activity will be the individual responsible for meeting the scheduled dates for that activity.

SURF Process

- SURF users will capture the following information per activity (Fields **ONLY** to be modified - Use **BOLD** Font)
 - Actual Start (Have you started?)
 - Actual Finish (Have you finished?)
 - NEW remaining duration - Based on Data Date OR Expected Date Of Finish
- Remember, the Planed Finished Date on the SURF form is calculated based on the previous month's Data Date.

IMPROVED SURF FORM

CPS ID

Can't Modify

**New Remaining
Duration**

**Click To Go To
Gantt Chart
Based On Last
Months Data Date**

ACTIVITY ID	DESCRIPTION	CURRENT SCHEDULE		ORIG DUR	PREV DUR	ACTUAL		REM DUR	EXPECTED FINISH DATE
		START	FINISH			START	FINISH		

Forecast Progress from SURF Data Date of - 05/23/2003

T8SP	RESORT ROAD - DEVORE WASH	PM: DARIUSH ; 712-8427	BidRdy: 06/02/2003		VIEW SCHEDULE	
H407601C	CONSTRUCT NEW ROADWAY	RT: 188 BMP: 254.1	BidAdv: 07/01/2003			
		DIST: G	CO: GI	SCHEDULER: Sean McN		
MK45CS	Prepare Final Specs, Bid Sched, Estim.	03/18/2003	04/28/2003	19	1	03/18/2003 05/09/2003
MK45CS2	Finalize PS&E for distribution (field)	04/29/2003	05/16/2003	10	14	05/09/2003 05/23/2003
MKCS960	C&S Finalize Bid Package & Clearances	05/19/2003	06/13/2003	19	19	06/13/2003

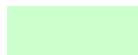
**Project Definition & Activity Identification
(-30 +60 Window Calculated From Data Date)**

**Scheduling Information Only
Based On Last Months Data Date**

Update Fields Required

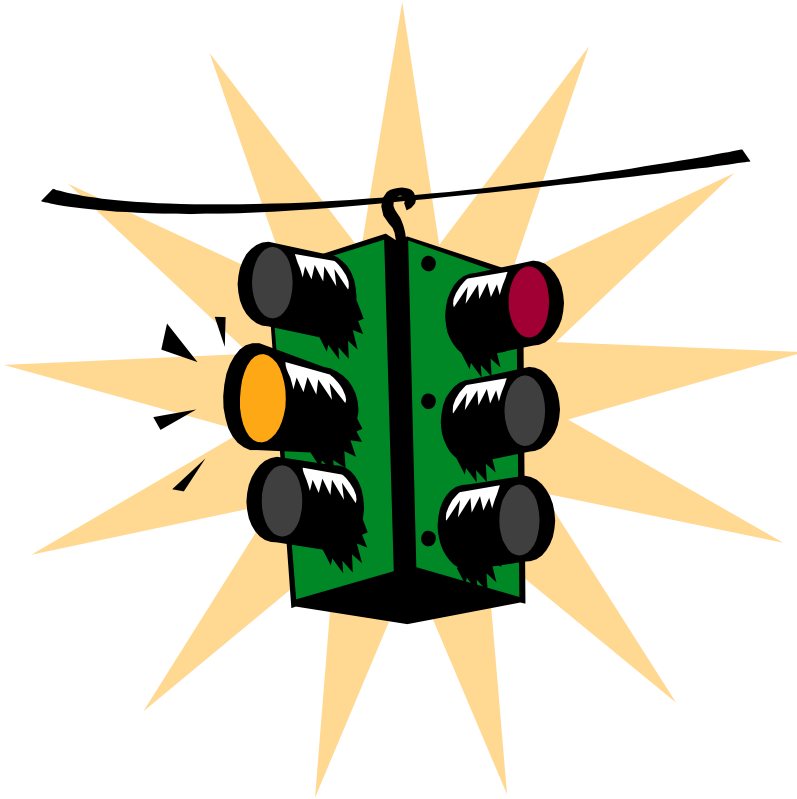
SURF EXAMPLES

ACTIVITY ID	DESCRIPTION	CURRENT SCHEDULE		ORIG DUR	PREV DUR	ACTUAL		REM DUR	EXPECTED FINISH DATE	
		START	FINISH			START	FINISH			
Forecast Progress from SURF Data Date of - 05/23/2003										
BF1E	MP 97.8 - MP 100.7 (SEGMENT IV)	PM: MICKELSON ; 5206205456				BidRdy: 10/01/2003				VIEW SCHEDULE
H503706C	CONST NEW RDWY (E OF EXISTING)	RT: 191	BMP: 97.8			DIST: S	CO: GH	SCHEDULER: Sean Mc		
VE44T1	Prepare Stage IV Traffic Deliverables	04/16/2003	06/11/2003	30	32	04/16/2003		10	06/09/2003	
VE45T1	Prepare Final Traffic Deliverables	07/14/2003	08/08/2003	20	20					
DF1E	MP 355 - 356 (HARDSCRABBLE RD)	PM: SCHELLHAMMER ; 712-8677				BidRdy: 09/01/2004				VIEW SCHEDULE
H541201C	RECONSTRUCT ROADWAY & DRAINAGE	RT: 191	BMP: 355			DIST: H	CO: AP	SCHEDULER: Maria De		
AL4303TD	Stage III Traffic Plans	04/16/2003	06/13/2003	59	34	04/16/2003		11	06/10/2003	
PA1E	SAN SIMON STREETS	PM: SCHELLHAMMER ; 712-8677				BidRdy: 11/03/2003				VIEW SCHEDULE
	2" AC + SC (MILL CG SECTION)	RT: 10B	BMP: 378			DIST: S	CO: CH	SCHEDULER: Maria De		
C74303TD	Stage III Trafic Plans	02/21/2003	05/15/2003	27	14	02/21/2003	05/15/2003			
C74403TD5	Stage IV Traffic Plans	05/27/2003	07/21/2003	39	39	05/19/2003		37	07/17/2003	



= Items entered by Technical Lead

Do and Do not



- Green means go.
Green heading columns are the only ones YOU need to update.
- Even if you have nothing to update, please send your form back to PPMS.

PM & SURF Calendar

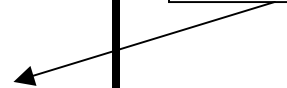
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	PM Reports Due COB	PPMS Enter PM Reports		Draft APSR		
			Blackout Period - No P3 Schedule Updates			
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	Final APSR				SURF Distribution	
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PM & TL update the schedule

PM & SURF Calendar

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		Final APSR			SURF Distribution	
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29	30					
	PM Reports DUE COB					

PM & TL update
the schedule



SURF Update

Environmental Planning Consultant

Objective:

Status activities based on Data Date of 5/23/2003

Specifics:

4443EP – ADOT signs May DEA and submits to FHWA

-Finished, Signed and submitted by May 16th, 2003

4453EP – FHWA signs May DEA

- All signatures were documented. Start May 19th; completed and sent to ADOT EEP May 20th, 2003

4473EP Public hearing meeting is to be held on June 12th

4483EP 30-Day public Hearing period ends should be a task, 15 day duration starting at date of Public hearing meeting.

SURF

Environmental Planning Consultant

ACTIVITY ID	DESCRIPTION	CURRENT SCHEDULE		ORIG DUR	PREV DUR	ACTUAL		REM DUR	EXPECTED FINISH DATE
		START	FINISH			START	FINISH		

DATA DATE= 05/23/2003

SA1F B-8 - I-8 PM: BRUDER ; 712-6836						BidRdy: 11/07/2003		BidAdv: 12/05/2003		VIEW SCHEDULE
H577407C	WIDENING	RT: 195	BMP: 23			DIST: Y	CO: YU	SCHEDULER: Maria De		
HE4443EP	ADOT signs May DEA and submits (05/12/2003	04/29/2003	2	2	05/12/2003	05/16/2003			
HE4453EP	FHWA signs May DEA	04/30/2003	05/06/2003	5	5	05/19/2003	05/20/2003			
HE4473EP	Public Hearing		06/04/2003	0	0					
HE4483EP	30-Day public comment period eds.		06/23/2003	0	0					
HE4503EP	LSD submits July Final EA to ADOT	06/24/2003	07/07/2003	9	9					
HE4513EP	ADOT submits comments on July Fir	07/08/2003	07/14/2003	5	5					
HE4523EP	LSD submits final EA to ADOT	07/15/2003	07/21/2003	5	5					
HE4433EP	LSD submits May DEA to ADOT	05/12/2003		0	0	05/12/2003				
HE4463EP	30-Day Public comment period begin	05/15/2003		0	0					

**Note: Scheduler will calculate early start based on the finish date of the public hearing.
EF = ES + 15**

SURF Update

Geo-Technical

Objective:

Status activities based on Data Date of 5/23/2003

Update SA1F only (project in slide before)

Specifics:

42XGS – Foundation Report

This report was started 4/23/2003

It is taking longer than previously forecasted, It will be done 25 days from Data Date

No other progress has been made on any of the other Geo-Tech activities.

SURF

Geo-Technical

ACTIVITY ID	DESCRIPTION	CURRENT SCHEDULE		ORIG DUR	PREV DUR	ACTUAL		REM DUR	EXPECTED OR FINISH DATE
		START	FINISH			START	FINISH		
Forecast Progress from SURF Data Date of - 05/23/2003									
SA1F	B-8 - I-8	PM: BRUDER ; 712-6836				BidRdy: 11/07/2003			
H577407C	WIDENING	RT: 195	BMP: 23			BidAdv: 12/05/2003		VIEW SCHEDULE	
HE42XGS10	Foundation Report	04/23/2003	05/30/2003	39	24	04/23/2003		25	06302003
TR1F	SAN PEDRO RIVER BRIDGES	PM: ITTY ; 712-8718				BidRdy: 01/02/2004		VIEW SCHEDULE	
H629201C	SCOUR RETROFIT & PRESERVATION	RT: 10	BMP: 306			DIST: S		CO: CH	SCHEDULER: Art Magana
KG4202GS	Request Geo,Survey Right of Entry from EP.	03/31/2003	05/19/2003	36	16	03/31/2003			
KG4203GS	Geotechnical Borings	05/20/2003	05/27/2003	5	5				
KG42XGS	Geotechnical Lab Testing & Report	05/28/2003	06/10/2003	10	10				

SURF Update

Right-Of-Way

Objective:

Status activities based on Data Date of 5/23/2003.

Specifics:

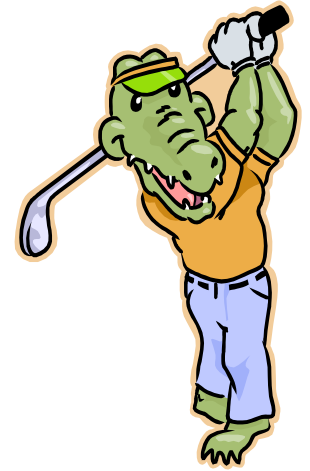
46XRW The Right of Way Clearance will be obtained when ADOT RW receives the final requirements from ADOT PM and Consultant. No progress has been made, still awaiting info. Remaining duration still is 82 days from data date.

No other progress has been made on any of the other Right-Of-Way activities.

SURF

Right-Of-Way

ACTIVITY ID	DESCRIPTION	CURRENT SCHEDULE		ORIG DUR	PREV DUR	ACTUAL		REM DUR	EXPECTED
		START	FINISH			START	FINISH		OR
Forecast Progress from SURF Data Date of - 05/23/2003									
SA1F	B-8 - I-8	PM: BRUDER ; 712-6836				BidRdy: 11/07/2003			
H577407C	WIDENING	RT: 195 BMP: 23				BidAdv: 12/05/2003		VIEW SCHEDULE	
HE46XRW	Right of Way Clearance	11/28/2002	10/08/2003	120	82	11/28/2002		82	SCHEDULER: Maria Deeb
TP1F	MAINLINE AVE E 1/2 - AVE B	PM: BRUDER ; 712-6836				BidRdy: 02/02/2004		VIEW SCHEDULE	
H577403C	CONST 4 LANE DIVIDED HIGHWAY	RT: 195 BMP: 5.5				DIST: Y CO: YU		SCHEDULER: Maria Deeb	
IX4603RW	Prepare R/W Plans	07/09/2003	08/05/2003	20	20				
IX46KBRW	Prepare Parcel Plats, Legal Documents	07/16/2003	08/05/2003	15	15				
IX4603RW1	Prepare Delineation	07/09/2003	08/05/2003	20	20				

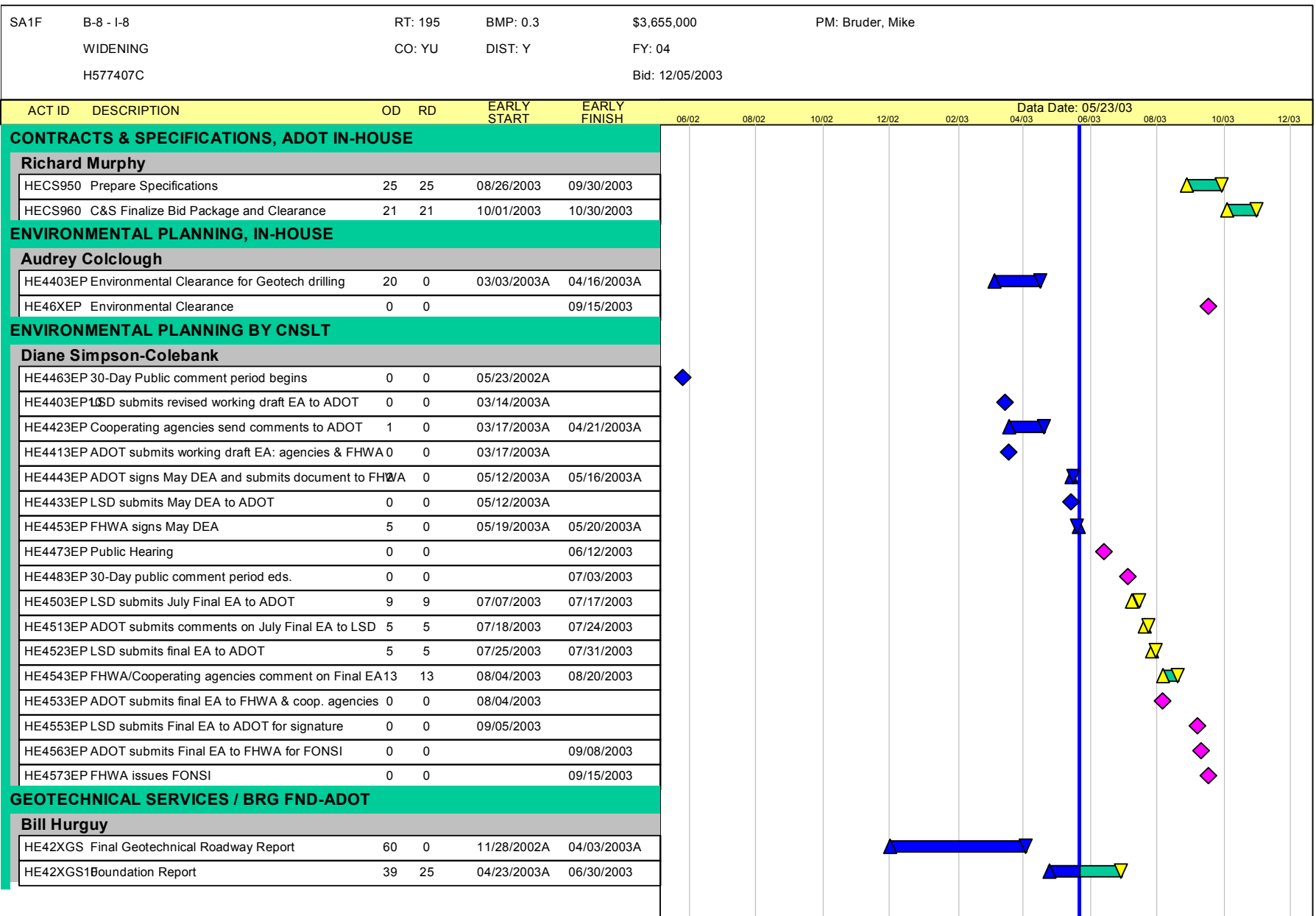


Gantt Chart

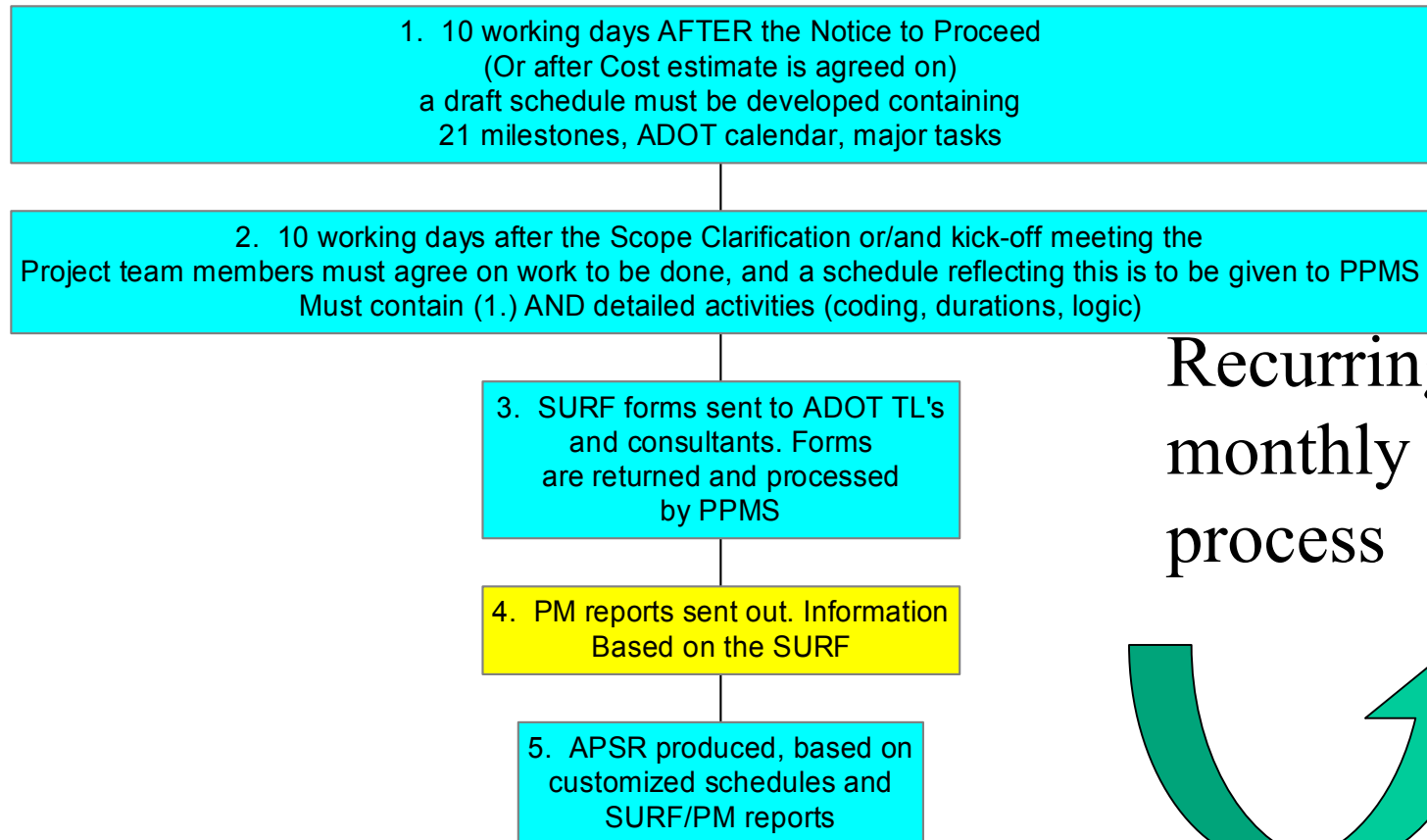
Using

View Schedule

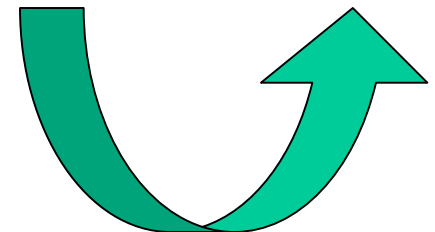
Link On SURF



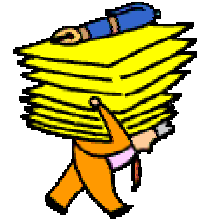
Information Development Process:



Recurring
monthly
process



PM Reports



- The Project Manager Report is distributed to the project managers. This is the opportunity for project managers to review the project data before it is reported to the public.
- Report contains modifiable and Read only fields.
- All changes should be made in **BOLD** font or hand written in red ink.
- Headings should be changed with caution. Cost & Bid Date changes must be approved by the PRB.
- Heading information should be changed on the first page only and made in bold letters.

PM Reports

- First Page Data Fields:
 - Activity ID & Description for the project's 21 major reported dates.
 - Planned Dates are the original target dates of the customized schedule.
 - Act/Cur Sch. Dates is the current “Can Finish Date” or Actual Completion Date (Followed By An “A”)
 - Variance Workdays is the difference between Act/Cur Sch date & the Planned date.
 - Comments will appear on the PM report only for that activity.
 - Comments to appear on the APSR are added to the comments on the C&S Finalize Bid Package & Clearances (CS960) activity.

PM / PROJ. NAME:		ROBERGE / PHX - CORDES JCT, PUMP STATION				View Schedule
TYPE OF WORK:		SAFETY IMPROVEMENTS				
SCHEDULER:		MARIA DEEB-ROBERGE				
CPS ID:	TO1F	DISTRICT:	E	ITEM NO.:		
ROUTE:	17	COUNTY:	MA	CONSULTANT:		
BMP:	199	COG:		ORIGINAL PROGRAM COST:	\$0	
LENGTH:	0.1	TRACS NO.:	H602001C	CURRENT PROGRAM COST:	\$381,000	
		PROGRAM FY:	04	BID ADVERTISEMENT DATE:	07/07/03	

**Based On
The
Current
Data Date**

Project Milestones (Planned Dates and Variance are READ ONLY); *Planned Dates are based on early finish dates.

Activity ID	Activity Description	*Planned Dates	Act/Cur Sch. Dates	Variance Workdays	Comments
2AXPL	Pre-Design/Scoping (Complete)				
40XPL	Design Start	06/25/02	06/25/02A	0	
40XPL1	Project Start-up/Kick-off	08/28/02	08/28/02A	0	
41XES	Mapping/Survey (Complete)	09/04/02	09/04/02A	0	
41XPL	Design Stage I (Complete)				
42XGS	Geo. Test and Report (Complete)				
42XVA	Value Analysis (Complete)				
46XEP	Environmental Clearance (Obtained)	02/07/03	02/07/03A	0	
42XPL	Design Stage II (Complete)				
46XRW	Right-of-Way Clearance (Obtained)	05/20/03	04/29/03A	15	
43XTD	Traffic Control Plans (Complete)	02/10/03	02/10/03A	0	
43XPS	Material Memo (Obtained)				
43XPL	Design Stage III (Complete)	11/12/02	11/12/02A	0	
46XUR	Utility and Railroad Clearance (Obtained)	05/01/03	03/31/03A	23	
44XPL	Design Stage IV (Complete)	02/10/03	02/10/03A	0	
45XPL	Final PS&E (Complete)	05/01/03	05/05/03A	-2	
CS960	C&S Finalize Bid Package & Clearances	06/02/03	06/02/03	0	
CS998	Bid Advertisement Package Ready		06/02/03		
CS999	Bid Advertisement Date	07/07/03	07/07/03	0	
6XPL	Bid Award Date	08/04/03	08/04/03	0	
7XPL	Facilities Open to Traffic	12/02/03	12/02/03	0	
	Estimated Construction Duration (Workdays)		40		
	TOTAL FLOAT		0		

Project Cost Estimates and Comments

Cost Estimates	Amount (\$)	<p>Comments to appear in the APSR</p> <p>Phase II of the Water Pump Safety Improvements will design safety improvements for the remaining 27 stations of the Phoenix area. Phase I has successfully been completed, C&S will complete project's BID package ready by target date. Phase II is in first stages of Cost Proposal negotiation and project team building.</p> <p>For PPMS use only: NOTE CHANGES IN COMMENTS</p>
Initial Estimate		
Design Stage II		
Design Stage III		
Design Stage IV		
Agreement Estimate		
Bid Award Amount		

PM Reports

- Second Page Data Fields:
 - Heading information is the same as page 1 and should not be changed on this page.
 - Activity ID & Description for activities within the -30 + 60 day window based upon the Data Date.
 - Planned Start is the current “Can Start Date”
 - Planned Finish is the current “Can Finish Date”.
 - Actual Start is the field which states or asks for an actual start date. Only to be filled in when the activity has started.
 - Actual Finish is the field which states or asks for an actual finish date. Only to be filled in when the activity has completed.
 - OD is the Original Duration for the activity.
 - RD is the Remaining Duration for the activity and can be updated.
 - Responsibility (Resource/Org) is the Technical Lead/Resource responsible for updating the activity status.

PM / PROJ. NAME:		ROBERGE / PHX - CORDES JCT, PUMP STATION							
TYPE OF WORK:		SAFETY IMPROVEMENTS							
SCHEDULER:		MARIA DEEB-ROBERGE							
CPS ID:	TO1F	DISTRICT:	E	ITEM NO.:	0				
ROUTE:	17	COUNTY:	MA	CONSULTANT:	0				
BMP:	199	COG:	0	ORIGINAL PROGRAM COST:	\$0				
LENGTH:	0.1	TRACS NO.:	H602001C	CURRENT PROGRAM COST:	\$381,000				
			PROGRAM FY:	04	BID ADVERTISEMENT DATE:	07/07/03			

DETAIL PROJECT SCHEDULE (DATA DATE +60/-30 DAYS): DATA DATE = 05/23/2003

FLOAT	Activity I.D.	DESCRIPTION	CURRENT START	CURRENT FINISH	ACTUAL START	ACTUAL FINISH	OD	RD	RESPONSIBILITY (RESOURCE / ORG)
	4431RW	RW Clearance process complete	04/22/03	04/29/03	04/22/03	04/29/03	7	0	Martha Harrell
	46XRW	Right-of-Way Clearance (Obtained)	04/29/03	04/29/03	04/29/03	04/29/03	0	0	Martha Harrell
	4501PLC	Final Safety Plan development: PS&E	02/11/03	05/05/03	02/11/03	05/05/03	30	0	Maria Deeb-Roberge
	45XPL	Final PS&E (Sealed)	03/28/03	05/05/03	03/28/03	05/05/03	25	0	Maria Deeb-Roberge
	45XPLC	Final PS&E Submittal	05/05/03	05/05/03	05/05/03	05/05/03	0	0	Maria Deeb-Roberge
	46XEP10	Re-assessed Environmental Clearance (A	02/10/03	05/10/03	02/10/03	05/10/03	22	0	Thor Anderson
0	CS960	C&S Finalize Bid Package & Clearances	05/02/03	06/02/03	05/02/03		21	5	Steve Beasley
0	CS998	Bid Advertisement Package-Ready	06/02/03	06/02/03			0	0	Maria Deeb-Roberge
0	CS999	Bid Advertisement Date	07/07/03	07/07/03			0	0	Maria Deeb-Roberge

PROJECT ISSUES AND ACTIONS

Environmental Clearance received 2/04/2003
Purchae of new Right of Way was required at the Peoria Pump Station due to channel improvement require re-design and re-location of the drainage channel.
R/W coordinator expects to have R/W clearance by June 30th, 2003
1/22/2003 due to task modification #1 (improvement of the drainage channel at the Peoria Pump station due to concrete desintegration at the surface due to water flow)
new R/W is required as well as a TCE . TCE is required for geotechnical investigation & blue staking to happen. (expect to be completed by 2/11/03 with geo & blue-staking)
Upgrades to include ventilation and fire detectors are not sufficient to comply with NFPA code 820 which states that if a modification is performed, then that modification must bring facility up to Fire code standards. Meeting with District and FireMarshall is to happen so resolution is given to the issue.
Complying with ADOT new Asbestos policy, requires that testing is performed at 22 stations & determine if at any site abaitment has to occur before construction

PROJECT HISTORY

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Project Float Time



Project Total Float Description:

- The number of days your project is ahead or behind schedule.
- Positive Float = Ahead Of Schedule
- Negative Float = Behind Schedule

Customized Projects Total Float Time

Project Manager: (PM Name)

The following is a list of your projects in Float Days sequence. The negative float time may be attributed to one of the following:

1. The schedule has not been updated properly.
2. The project is really behind schedule and may need to be reviewed and appropriate action taken.
3. You may have to go to the PRB to get approval for additional funding or extend the Bid Advertisement Date.

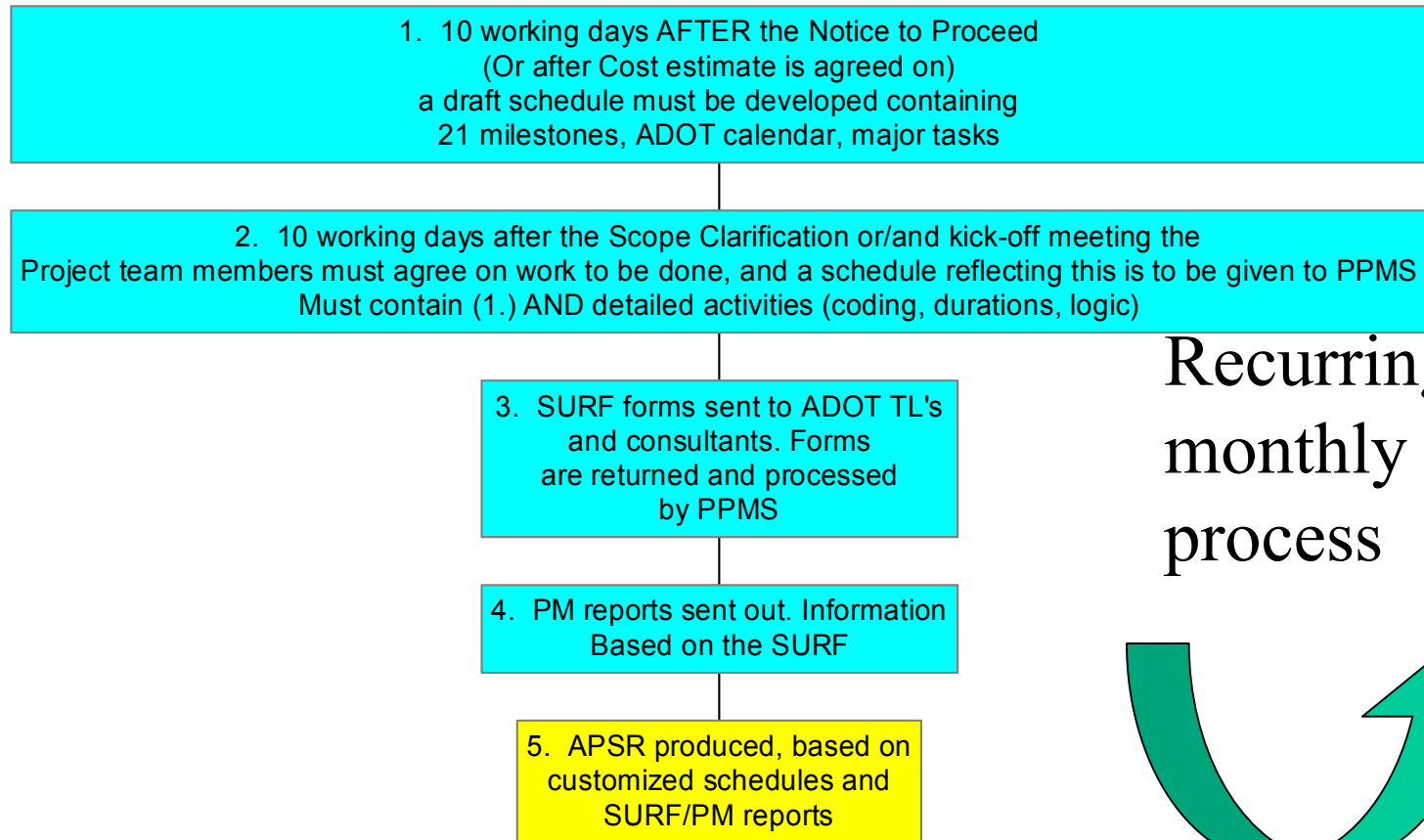
If you feel the report is in error please let us know immediately.

CPSI	Project Name	Type Of Work	Scheduler	Rout	Beginning Mile	Bid Date	Total Float
UV1	BULLHEAD STREETS	SPOT MILL & ARFC	Dean Mees	95	243.9	03/01/200	-13
UP1	JCT SR 260 & SR 87 C AMP VERDE	ADD LEFT AND RIGHT URN	Dean Mees	87	278.5	02/01/200	-8
HX1	NEEDLES - COURTWRIGHT	3" AC + FC	Dean Mees	95	226.0	07/01/200	1
UB1	TUSAYAN STREETS	RR 3" + ARFC	Dean Mees	64	233.0	02/01/200	2
EG1	STONEMAN LAKE - FLAG STAFF	RECST R/W FENCE	Dean Mees	17	312	07/01/200	13
IC1E	TUBA CITY - COAL MIN E RD	ARFC OVERLAY	Dean Mees		322.0	02/07/200	14
DD1	ADAMANA FRONTAGE	2" OVERLAY	Dean Mees	40	303.6	05/01/200	17
HI1E	SILVER CREEK - BERNA RDINO	RR 3" AC + SC	Dean Mees	80	379.0	01/03/200	21
IA1E	LANDFILL RD - STANDARD PARALLEL	2" AC + 1/2" AR-ACFC	Dean Mees		318.0	11/01/200	32

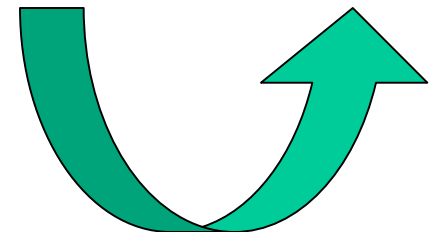
Total Float

- Reasons for Total Float to be negative:
 1. Activities have not been correctly updated.
 2. Underestimated time & resources for a specific activities.
 3. Unforeseeable conditions have made the project late.
 4. Corrective action needs to be taken to get back on schedule.
- This development process emphasizes the need for all updates.

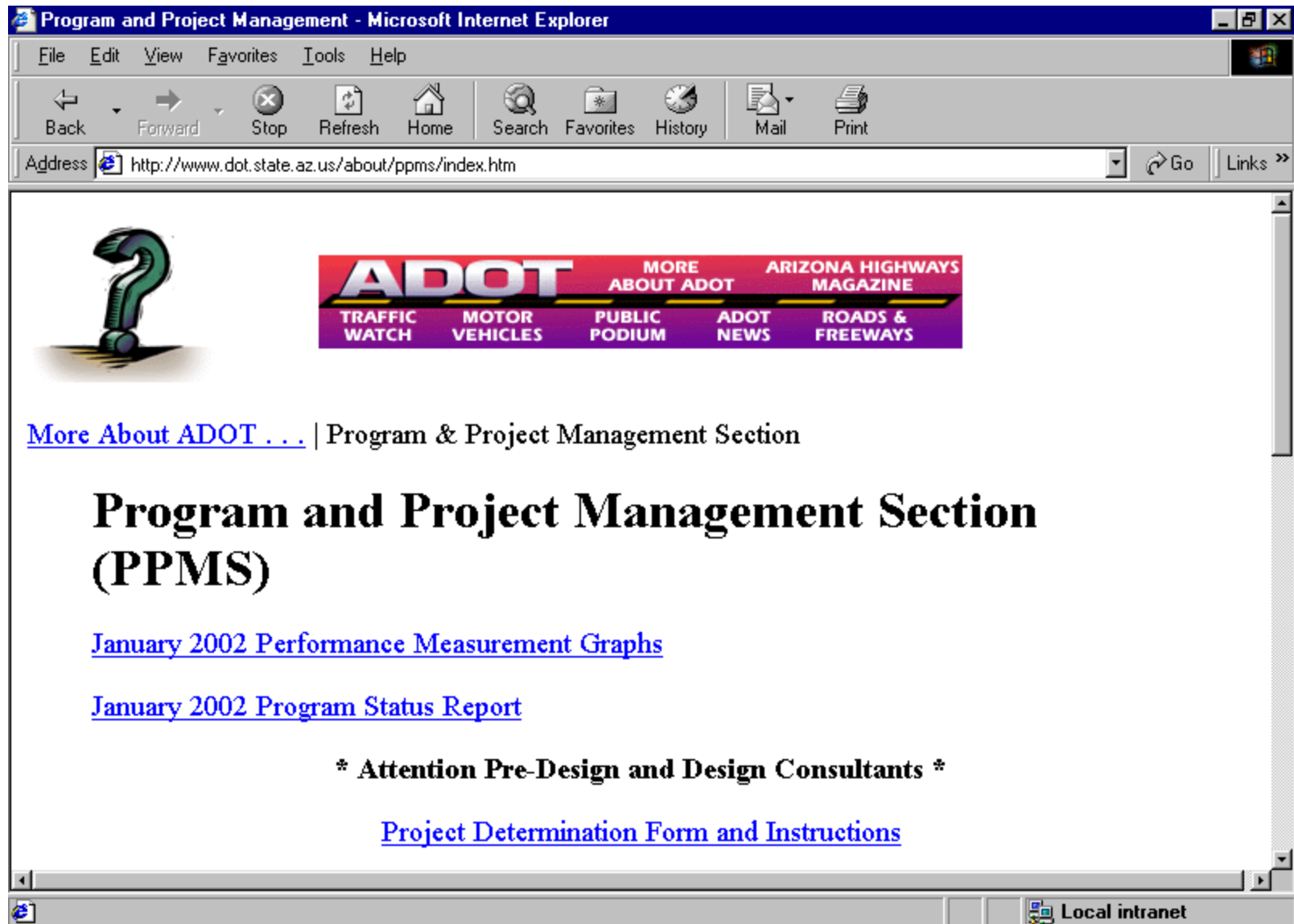
Information Development Process:

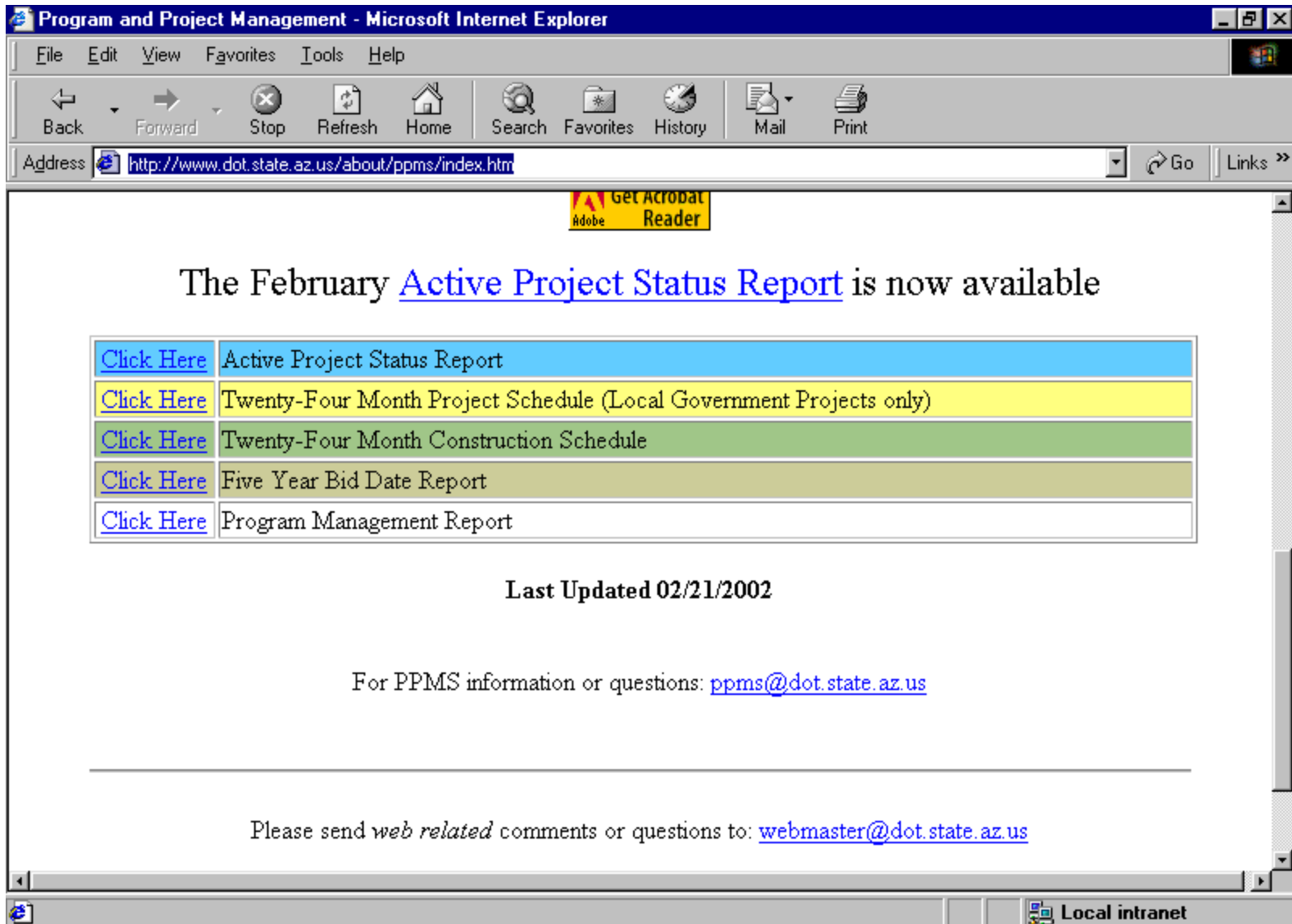


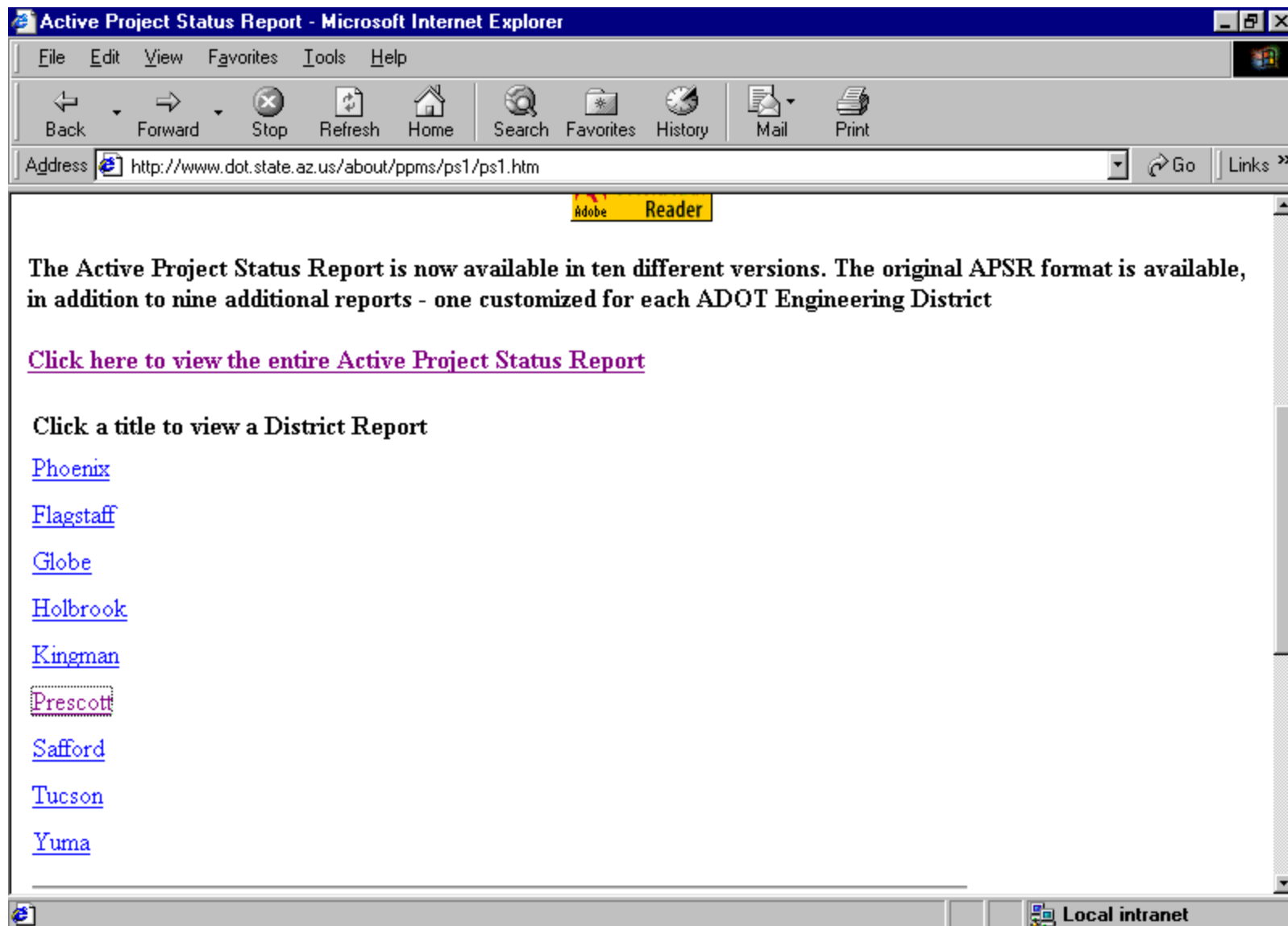
Recurring
monthly
process



<http://www.dot.state.az.us/about/ppms/index.htm>







APSR Report

- The Active Project Status Report (APSR) contains schedule milestone data for each programmed project.
 1. Projects Added.
 2. Projects Deleted.
 3. Projects Rescheduled.
 4. Design Projects without Construction.
 5. Projects which Failed to Advertise.
 6. All Projects are sorted by Bid Ready Date.
 7. Project Index sorted by Route and Milepost.

What's In It For Me!

- Facilitates communications.
- Tells you if you are going to finish on time.
- Provides history for planning future projects as well as a background of effective corrective measures which have been implemented.
- It's a learning ground for better planning and risk management.
- Unbiased measurement of individual and team performance.

Quality /Assurance Questions & Answers

- 1-on-1 SURF & PM training available.
 - Call Sean McNabb (712-8827) to schedule a time.
- Feedback and suggestions on forms/presentation are welcome.

Appendix

PROGRAM & PROJECT MANAGEMENT SECTION

Schedulers

205 South 17th Avenue, Mail Drop; 620E, Room 361E
Phoenix, Arizona 85007
Fax 712-3207

<u>Name</u>	<u>Telephone No.</u>
Bagnall, John	(602) 712-8721
Baune, Roger	(602) 712-8764
Dayzie, Misty	(602) 779-7529
Deeb-Roberge, Maria	(602) 712-8785
Magana, Art	(602) 712-7563
McNabb, Sean	(602) 712-8827
Mees, Dean	(602) 712-8716
Silva, Leonel	(602) 712-8657
Wise, Elissa	(602) 712-8715

PM & SURF Calendar

June 2003						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6 (BTS)	7
	PM Reports Due 6/3/03 COB		PPMS Enter PM Reports		Draft APSR	
				P3 Blackout Period		
8	9	10	11	12	13	14
		Final APSR			SURF Distribution	
	P3 Blackout Period					
15	16	17	18	19	20 (BTS)	21
	SURF Spreadsheets / Consultant Schedules due Friday June 20 Close Of Business.				APSR Data Date	
22	23	24	25	26	27	28
	Enter SURF Updates	Enter SURF Updates	Distribute PM Reports	PM Reports Due 6/30/03 COB		
29	30					
	PM Reports DUE COB					

PM & SURF Calendar

July 2003						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4 (BTS)	5
		PPMS Enter PM Reports		Draft APSR		
			P3 Blackout Period			
6	7	8	9	10	11	12
		Final APSR				
	P3 Blackout Period					
13	14	15	16	17	18 (BTS)	19
20	21	22	23	24	25	26
					SURF Distribution	
27	28	29	30	31		
	SURF Spreadsheets / Consultant Schedules due Friday August 1 Close Of Business.					

PM & SURF Calendar

August 2003						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 (BTS)	2
					APSR Data Date	
3	4	5	6	7	8	9
	Enter SURF Updates	Enter SURF Updates	Distribute PM Reports	PM Reports Due 8/11/03 COB		
10	11	12	13	14	15 (BTS)	16
	PM Reports DUE COB	Enter PM Reports		Draft APSR		
	Blackout Period - No P3 Schedule Updates					
17	18	19	20	21	22	23
	Final APSR				SURF Distribution	
	Blackout					
24	25	26	27	28	29 (BTS)	30
	SURF Spreadsheets / Consultant Schedules due Friday August 29 Close Of Business.				APSR Data Date	
31						

PM & SURF Calendar

September 2003						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 Holiday	2	3	4	5	6
		Enter SURF Updates	Enter SURF Updates	Distribute PM Reprots	PM Reports Due 9/9/03	
7	8	9	10	11	12 (BTS)	13
	PM Reports Due 9/9/03		PPMS Enter PM Reports		Draft APSR	
				Blackout Period		
14	15	16	17	18	19	20
		Final APSR			SURF Distribution	
	Blackout Period					
21	22	23	24	25	26 (BTS)	27
	SURF Spreadsheets / Consultant Schedules due Friday September 26 Close Of Business.				APSR Data Date	
28	29	30				
	Enter SURF Updates	Enter SURF Updates				

PPMS Receiving Procedures

After developing your schedule
Backup the project and e-mail it to
ADOT Scheduling using the
following procedure.



Backup/Restore

Problem: A project needs to be backed up so I can send it via email.
How do I use SureTrak to create a back up of a project?

Solution: The steps to create a back up of project using SureTrak Project Manager is as follows:

1. Open SureTrak Project Manager.
2. Select Tools, Project Utilities, Backup. SureTrak's Backup window will appear.

Backup

From folder: C:\My Documents\SureTrak\Projects Browse...

Project name:

Project group: [Dropdown]

Type: SureTrak [Dropdown]

Projects:

Name	Number/Version	Title
Customer Billing Sys	Sample	Customer Billing System
Office Building Addi	Sample	Office Building Addition
Radio Station Launc	Sample	KCOB Radio Station Launch
Video Production Pr	Sample	Granada Marketing Video

To folder: C:\My Documents Browse...

Project name:

Project group:

☒ Include shared layouts

☒ Compress

Backup Close Help

Select:
Project Group
(.PRX File Extension)

Backup/Restore

3. In the backup window, there are several sections that need attention prior to backing up the project. The first being the "From folder". The "From folder" is asking you to point it to the folder that contains the project you wish to back up. You can change the location by hitting the "**Browse..**" button. You may need to change the "Type" that SureTrak is looking for. Send a single file, change the type to "Project Groups" type project and it will create a single file for easier sending through email.

Project Group type projects, once backed up, will have a ".prx" extension.

The next area that you will need to set is the "To folder". The "To folder" is asking you where you want SureTrak to put the backed up project. You can change the location by hitting the "**Browse..**" button.

4. If layouts associated with reports that the recipient will need to run, check the "Include shared layouts" option.

5. Check the "Compress" option to reduce the total file size.

6. Click "**Backup**". You can now attach this project to email.

Note: Topic Activities are not included in the backup and will not be restored. ADOT Scheduling does not use Hammocks. If sending a schedule, please name the project using distinctive or incremental method. For example: TI01, TI02, AD01, AD02, etc.

Design Document Checklist